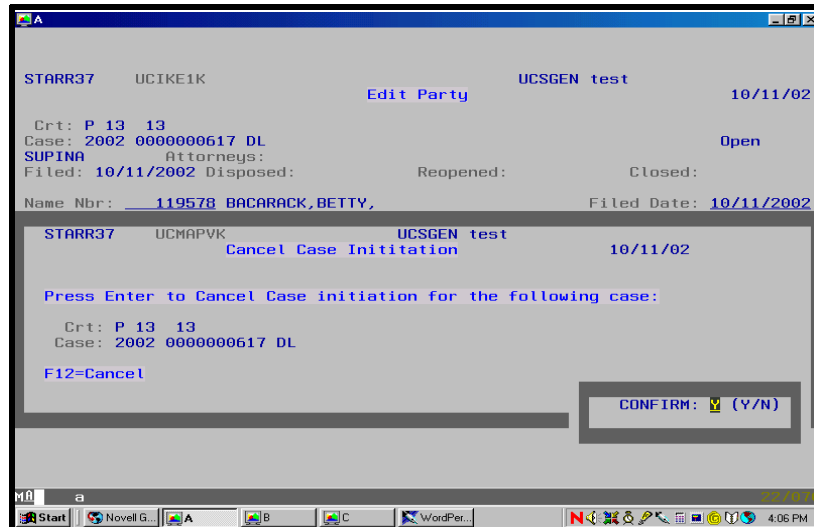


## Cancel Case Initiation



The case initiation process may be cancelled at the edit party screen by pressing <F23>.

This will delete any information that has been defined for this case number.

Press <Enter> to confirm.

## Notice of Hearing Event

STARR37 UCIXE1K Rel Mar02 Calhoun-JISP13DB03:P13PCSD03  
 Edit Event 10/23/02

Crt: P 13 13  
 Case: 2002 0000001425 GA CANDICE CALHOUN Open  
 Attorneys: CAMPBELL  
 HARTER Filed: 1/22/2002 Disposed: Reopened:

Evt: NOH Dte: 10/23/2002 Plea: Dsp: Pgm/Rslt: Monetary:  
 Pty: Cnt: Attny: Jur: J 24309 Due Dte:  
 Cmt:  
 Form: PC 562 Register: Receipt: Amount:

Schedule Next Action:  
 Next: HRG Date: 10312002 Time: 1100 A Jur: Ctrm:  
 Cmt:

F3=Exit F10=Name F13=Cmts F14=More Comments F16=Calc F20=Bonds

Connected to remote server/host DSMLANS using port 23

Evt: “NOH” Notice of Hearing Dte: Event date

Pgm/Rslt: Select the program result necessary to bring in text stating the nature of the hearing

Form: Enter form number PC 562

### Schedule Next Action:

Next Type of hearing code (<F4> Prompt for options)

Date Date hearing is scheduled

Time Time of hearing

Jur. Defaults to Jurist of record, need to complete only if different

Ctm. Defaults to Jurist’s courtroom (as defined in professional file), need to complete only if different

Cmt. Additional comments regarding the scheduled hearing, will only appear on calendar

Press <ENTER>

## **Form Generation - PC 562 - Notice of Hearing**

Next Action information will be automatically added to the jurist's calendar and the form processing will begin.

Complete:

Number of copies to be printed

“X”, if marked <press enter> comment screen will appear to state the nature of the hearing (If program/result entered the text will be display for completion)

Petitioner

Name: Prompt and select the petitioner's name, the party's attorney information will be automatically updated.

“X” Mark if all parties receiving notice are to attend the hearing

Press <F21>

Form will generate and create an event of “Form Generated Notice of Hearing”

## Proof of Service Event

The screenshot shows a legal software window titled 'A'. The interface is a text-based form with the following fields and values:

- STARR37 UCIXE1K Rel Mar02 Calhoun-JISP13DB03:P13PCSD03
- Edit Event 10/31/02
- Crt: P 13 13
- Case: 2002 0000001425 GA CANDICE CALHOUN Open
- Attorneys: CAMPBELL
- HARTER Filed: 1/22/2002 Disposed: Reopened:
- Evt: POS Dte: 01252002 Plea: Dsp: Pgm/Rslt: Monetary:
- Pty: Cnt: Attny: Jur: J 24309 Due Dte:
- Cmt: Form: PC 564 Register: Receipt: Amount:

Below the main form, there is a section for 'Schedule Next Action:' with fields for Next, Date, Time, Jur, and Ctrm. At the bottom, a row of function keys is listed: F3=Exit F10=Name F13=Cmts F14=More Comments F16=Calc F20=Bonds. The Windows taskbar at the bottom shows the Start button, Novell G... icon, and several open applications including WordPer... The system clock shows 8:49 AM.

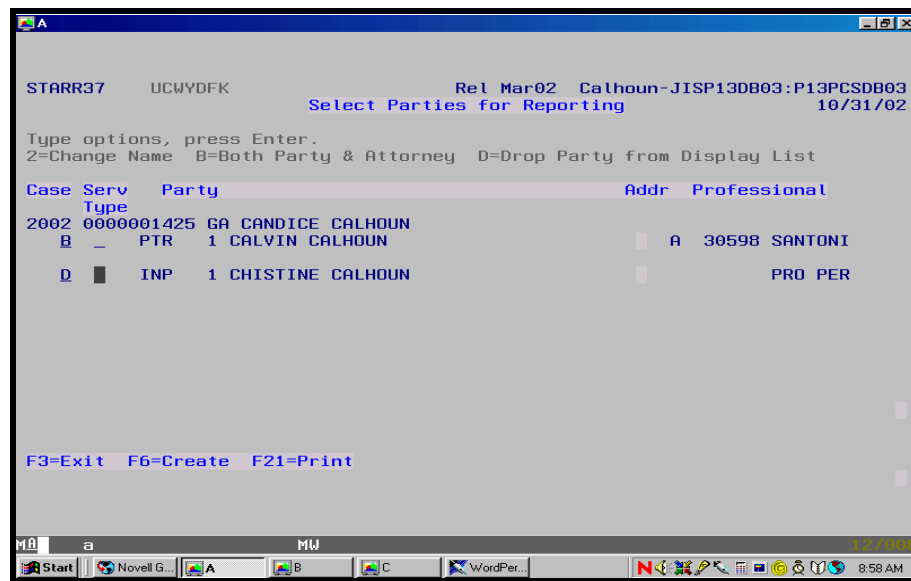
Event: POS "Proof of Service"

Date: Event date

Form: PC 564

Press <ENTER>

## Select Parties for Reporting on Proof of Service



### Step 1

#### Options

**B** Designates that “Both” the party and their attorney received the notice

**D** Designates that the party is to be “Dropped” they will not receive notice

Press <ENTER> This step may be by passed if no adds or drops are necessary

### Step 2

Select Service Type - Proof of Service by:

**P** Personal

**N** Non Service

**M** Mail

Press <ENTER>

Press <F21>

### Step 3 - Proof of Service Generating the Form

STARR37 UCV1E1K Rel Mar02 Calhoun-JISP13DB03:P13PCSD003  
 Proof of Service 10/31/02  
 PC 564  
 Court: P 13 13 Copies: 1 Page 1 of 1  
 Case: 2002 0000001425 CANDICE CALHOUN Open  
 Attorneys: CAMPBELL  
 Jur: HARTER Filed: 1/22/2002 Disposed: Reopened:  
 Name of the papers served or mailed: Notice of Hearing  
 X 2. I served by ☒ ordinary mail ☐ registered mail ☐ certified mail  
 the papers described above on:  
 X 3. I served by personal service the papers described above on:  
 4. After diligent search and inquiry, I have been unable to find and serve  
 the following interested persons:  
 I have made the following efforts in attempting to serve process: \_\_\_\_\_  
 Date: 10/31/2002 Signature Starr Wieber  
 F3=Exit F10=Name F13=Cmnds F16=Calc F21=Print

Complete title of document(s) that were served

Complete the applicable type of mail service for #2, or comments regarding efforts to serve process for #4

Date Defaults to current date

Signature - Clerk's name processing the Proof of Service

Press <F21>

If applicable continue with

Evt "PUB" Publication of Notice of Hearing

Form PC 563

## Hearing Event

STARR37 UCIXE1K Rel Mar02 Calhoun-JISP13DB03:P13PCSD03  
 Edit Event 10/31/02

Crt: P 13 13  
 Case: 2002 0000001425 GA CANDICE CALHOUN Open  
 Attorneys: CAMPBELL

HARTER Filed: 1/22/2002 Disposed: Reopened:

Evt: HRG Dte: 2/01/2002 Plea: Dsp: Pgm/Rslt: Monetary: \_  
 Pty: Cnt: Attny: Jur: J 24309 Due Dte: \_  
 Cmt: Determined that Calvin Calhoun would be appoint as Guardian  
 Form: Register: Receipt: Amount: \_

Schedule Next Action:  
 Next: Date: Time: Jur: Ctrm: Cmt:

F3=Exit F10=Name F13=Cnds F14=More Comments F16=Calc F20=Bonds

Event: HRG "Hearing"

Cmt: Any additional comments regarding the hearing

Press <Enter>

## Order Appointing Guardian



### Adjudication

- Event that contains a disposition type and a disposable party
- Counted on Caseload Part 2 - Method of Disposition - Sections A, C & D

STARR37 UCIXE1K Rel Mar02 Calhoun-JISP13DB03:P13PCSD03  
 Edit Event 10/31/02  
 Crt: P 13 13  
 Case: 2002 0000001425 GA CANDICE CALHOUN Open  
 Attorneys: CAMPBELL  
 HARTER Filed: 1/22/2002 Disposed: Reopened:  
 Evt: OAG Dte: 2/02/2002 Plea: Dsp: GTD Pgm/Rslt: Monetary:   
 Pty: HDR 1 Cnt: Attny: Jur: J 24309 Due Dte:   
 Cmt:   
 Form: Register: Receipt: Amount:   
 Schedule Next Action:   
 Next: Date: Time: Jur: Ctrm:   
 Cmt:   
 F3=Exit F10=Name F13=Cmts F14=More Comments F16=Calc F20=Bonds

Evt: OAG "Order Appointing Guardian"

Dte: Date of order

Dsp: GTD "Granted"

Pty: HDR 1 "Header" (Header is the only disposable party on a probate case)

Press <Enter>



After an event disposing the header party these changes should occur

- A disposed date on the case header will be displayed
- The case status will change from Open to Adjudicated



## Acceptance of Appointment

STARR37 UCIXE1K Rel Mar02 Calhoun-JISP13DB03:P13PCSD03  
 Edit Event 11/06/02  
 Crt: P 13 13  
 Case: 2002 0000001425 GA CANDICE CALHOUN Adjudicat  
 Attorneys: CAMPBELL  
 HARTER Filed: 1/22/2002 Disposed: 2/04/2002 Reopened:  
 Evt: AOA Dte: 02042002 Plea: Dsp: Pgm/Rslt: Monetary:  
 Pty: GDN 1 Cnt: Attny: Jur: Due Dte:  
 Cmt:  
 Form: Register: Receipt: Amount:  
 Schedule Next Action:  
 Next: Date: Time: Jur: Ctrm:  
 Cmt:  
 F3=Exit F10=Name F13=Cmts F14=More Comments F16=Calc F20=Bonds

Evt: AOA Acceptance of Appointment

Dte: Date of acceptance

Pty: Party type and number, may prompt to select and/or change the fiduciary's party type  
 (See page 26 to change party type)

Once the fiduciary party is updated - Set a Bond with the event

Press <F20> Bond (Shift + F8)

## Change Party type (Acceptance of Appointment event continued)

STARR37 UCIXE1K Rel Mar02 Calhoun-JISP13DB03:P13PCSD03

STARR37 UCW2DFK

Select Parties for Event

Case: 2002 0000001425 GA CANDICE CALHOUN Open

Attorneys: CAMPBELL

Jur: HARTER Filed: 1/22/2002 Disposed: Reopened:

Type options, press Enter.  
1=Select 2=Change 5=Display C=Cases D=Dates

Party:   

Pty	Name	Disp	Attorney	Anniv Dt
HDR 1	CALHOUN, CANDICE,		CAMPBELL, J R	
INP 1	CALHOUN, CHISTINE,			
PTR 1	CALHOUN, CALVIN,		SANTONI, RI R	

F3=Exit F6=Create F17=Top F18=Bottom

<F4> Prompt on Party field  
2 to change party type

Press <Enter>

Change the Party type to  
GDN "Guardian"

Y at Party Category  
(Guardians must be  
designated as over a Person  
and/or Estate, other party  
types are may be designated  
with a category such as  
Special/Temporary,  
Successor)

<Enter>

STARR37 UCIXE1K Rel Mar02 Calhoun-JISP13DB03:P13PCSD03

Edit Party 10/31/02

Crt: P 13 13

Case: 2002 0000001425 GA CANDICE CALHOUN Adjudicat

HARTER Attorneys: CAMPBELL

Filed: 1/22/2002 Disposed: 2/02/2002 Reopened: Closed:

Name Nbr: 580277 CALHOUN, CALVIN, Filed Date: 1/22/2002

Party: GDN 1 PETITIONER Party Cat? Y

Public: P

Current Address: 383 GLENGROFT LANE Address Code: 871478

City: BATTLE CREEK St: MI Zip: 48897

Phone: Ext: Gender: M DOB: 12/19/1982 Age: 19

SSN: DLN: St:

Attny: 30598 SANTONI, RICHARD A., Appt/Ret: R Notices: Y

Cmt: Alt Names: \_

F3=Exit F10=Name F13=Cmds F16=Calc F19=Addr@File F21=Alt Names

Select Party Category(ies) (Person, Estate, Special/Temporary, Plenary, Limited)

<Enter>

Select the fiduciary <Enter> Return to the event screen, complete event (F20 Bond, if applicable)

<Enter>

## Bond Actions &lt;F20&gt; (Acceptance of Appointment event continued)

STARR37 UCQNETK Rel Mar02 Calhoun-JISP13DB03:P13PCSD003  
Bond Actions 11/06/02

Cashier:

Court: P 13 13  
Case: 2002 0000001425  
Count: \_\_\_\_\_

Posted For: 580277 CALHOUN, CALVIN,  
Posted By: \_\_\_\_\_

Bond: 1 Type: SUR SURETY Status: C Balance: .00

Act	Action Dt	Amount	Description	Action
SET	02042002	30000.00		

F3=Exit F10=Name F13=Cmde F16=Calc

**Cashier**

Enter financial password

**Type**

Enter type of bond (e.g. cash, surety, ten%)

**Court**

Defaults to user's court

**Status**

Closed - bond is set or cancelled

Open - Bond has been posted

**Case**

Defaults to event's case number

**Balance**

Balance of a monetary bond that has been posted.

**Court**

Criminal charge number

**Act**

Enter bond actions as they occur (e.g. Set Bond, Post Bond, Refund Bond)

**Posted for**

Defaults to event's party type/number

**Action Dte**

Enter the date of the action

**Bond**

Bond number (a person may have multiple bonds)

**Amount**

Enter the amount of the action

Press <ENTER> and you will returned to the event screen. Once all other information has been processed on the event, press <ENTER> again.

## Letters of Authority

- Sets the qualification/anniversary date for the fiduciary

STARR37 UCIXE1K Rel Mar02 Calhoun-JISP130803:P13PCSD0803  
 Edit Event 10/31/02  
 Crt: P 13 13  
 Case: 2002 0000001425 GA CANDICE CALHOUN Adjudicat  
 Attorneys: CAMPBELL  
 HARTER Filed: 1/22/2002 Disposed: 2/02/2002 Reopened:  
 Evt: LET Dte: 2/05/2002 Plea: Dsp: Pgm/Rslt: Monetary:  
 Pty: Cnt: Attny: Jur: J 24309 Due Dte:  
 Cmt: Form: Register: Receipt: Amount:  
 Schedule Next Action:  
 Next: Date: Time: Jur: Ctrm:  
 Cmt:  
 F3=Exit F10=Name F13=Cmts F14=More Comments F16=Calc F20=Bonds

Evt LET "Letters of Authority"

Dte Date of document

Pty Fiduciary party and number

To Post a Surety Bond with the event

Press <F20> Bonds (Shift + F8)

## Post Surety Bond &lt;F20&gt; (Letters of Authority event continued)

```

STARR37      UCQNETK                      Rel Mar02  Calhoun-JISP13DB03:P13PCSD0B03
Bond Actions                                     11/06/02
Cashier: 
Court: P 13  13
Case: 2002 0000001429 DA CHESTER CALHOUN
Count: 
Posted For: 686336 CALHOUN,CHESTER,C,JR
Posted By: 686336 CALHOUN,CHESTER,C,JR
Bond: 1 Type: SUR SURETY Status: 0 Balance: .00
Type options, press Enter.
4=Delete 5=Display
# Act Action Dte Amount Description Action
1 SET 2/04/2002 30000.00 SET BOND No Action
2 BSP 2/05/2002 30000.00 SURETY BOND POSTED Open Bond
F3=Exit F10=Name F13=Cmnds F16=Calc

```

Cashier        User's financial password

Posted by     Party's (Fiduciary) name number

Act.           Action of "BSP" Surety Bond Posted

Action Dte.   Date bond posted

Amount        Amount of surety bond posted

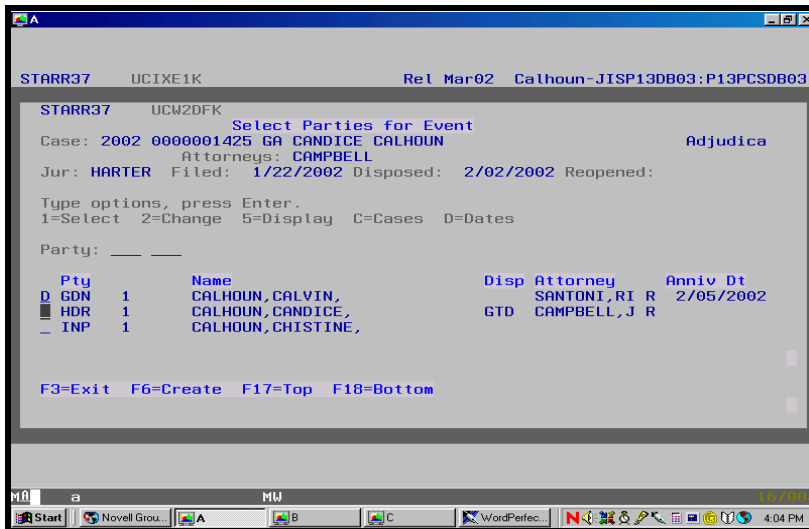
Press <Enter>

Returns to Edit Event screen, complete event

Press <Enter>

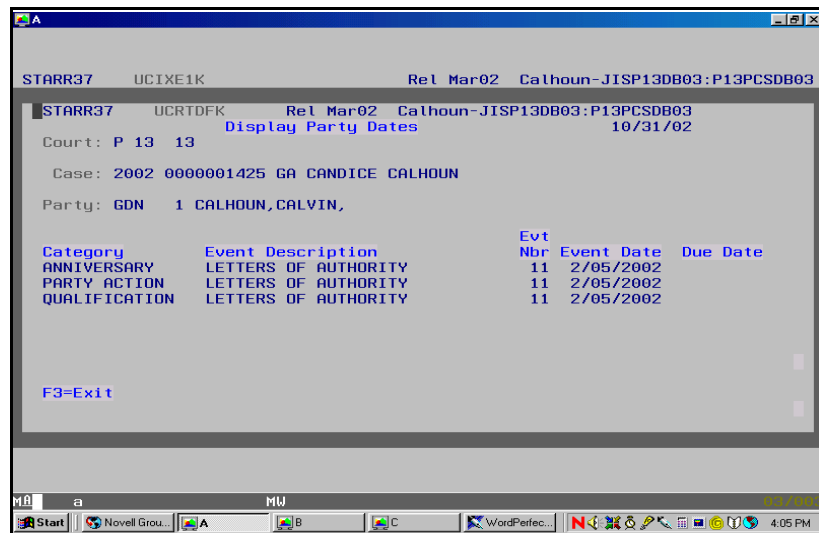
This will update the bond record and create an additional event of "Surety Bond Posted".

## Party Date File



<F4> prompt at the party field, then D next to the party, will display fiduciary filing dates, etc.

Events will be listed in chronological order and will assist in tracking probate report requirements



### Events Listed in the Party Date File

- Qualification Date
- Anniversary Date
- Inventory
- Annual Account
- Annual Report
- Notice of Continued Administration
- Party Actions (e.g. Extensions)

## Inventory Events

CA, CY, DD, GA, GM	DA Must create a financial order	DE Must create a financial order
INV F Inventory Filed (amount required)	INV F Inventory Filed (amount required)	INV F Inventory Filed (amount required)
INV Z Inventory Value Zero (no amount required)	INV Z Inventory Value Zero (no amount required)	INV V Inventory Value (amount required)  INV Z Inventory Value Zero (no amount required)

STARR37 UCIXE1K Rel Mar02 Calhoun-JISP13DB03:P13PCSD03  
Edit Event 11/05/02

Crt: P 13 13  
Case: 2002 0000001429 DA CHESTER CALHOUN Adjudicat

Attorneys:  
HARTER Filed: 2/05/2002 Disposed: 2/28/2002 Reopened:

Evt: INVE Dte: 04/05/2002 Plea: \_\_\_ Dsp: \_\_\_ Pgm/Rslt: \_\_\_ Monetary: Y  
Pty: PR 1 Cnt: \_\_\_ Attny: \_\_\_ Jur: \_\_\_ Due Dte: \_\_\_  
Cmt: \_\_\_  
Form: \_\_\_ Register: \_\_\_ Receipt: \_\_\_ Amount: 150000

Schedule Next Action:  
Next: \_\_\_ Date: \_\_\_ Time: \_\_\_ Jur: \_\_\_ Ctrm: \_\_\_  
Cmt: \_\_\_

F3=Exit F10=Name F13=Cmts F14=More Comments F16=Calc F20=Bonds

Evt: Invent  
o r y  
code

Monetary: Enter "Y", if applicable, process for creating financial order

Pty: Party responsible for filing the inventory  
(only one inventory per case, unless reopened)

Amount: Value of inventory, if other than zero

Press <ENTER>

## Create Inventory Financial Order

(Inventory event continued)

STARR37 UCHQEFK UCSGEN test 12/09/02

Court: P 13 13 Case: 2002 0000001430 DA CHESTER CALHOUN

Attorneys: HARTER Inv Fee: 425.00

Event: INV 11/05/2002 INVENTY FILD Pty: PR 1 Cnt: 0

Cash Code	Total Amount	---Parties---	Respond	Payer	Begin Payment	End Payment	J/S	Balance Fwd Paid
PINV	425.00	PR 1 PR 1	1	1	11/05/2002		N	Frequency: -
		Pay Seq: 1			Periodic Amt: 1		N	Frequency: -
		PR 1 PR 1	1	1	11/05/2002		N	Frequency: -
		Pay Seq: 1			Periodic Amt: 1		N	Frequency: -
		PR 1 PR 1	1	1	11/05/2002		N	Frequency: -
		Pay Seq: 1			Periodic Amt: 1		N	Frequency: -
		PR 1 PR 1	1	1	11/05/2002		N	Frequency: -
		Pay Seq: 1			Periodic Amt: 1		N	Frequency: -
		PR 1 PR 1	1	1	11/05/2002		N	Frequency: -
		Pay Seq: 1			Periodic Amt: 1		N	Frequency: -

F3=Exit F10=Names F13=Cmnds F16=Calc

- Inv Fee      Displays the calculated inventory amount due
- Cash Code    Inventory cash code (this will be based on the cash code your court has created).
- Total Amt    Enter the amount due for the inventory fee.
- Respond/  
Payer        Respondent party (usually HDR) and payer of the amount due, will default to party entered on event screen (usually PR)
- Begin date    Date the financial order was created
- Balance Fwd  
Paid          Amount previously paid on the financial order (receipts prior to going on the Trial Court System (TCS)). **Courts not using financial should bring the balance forward when the inventory fee has been paid.**

**Press the <Enter> key -**

You will be returned to the *Display Financial Orders* screen



You may create a receipt directly from the Display Financial Orders screen by entering a “Z” next to the name and pressing the <ENTER> key.

MITTSJ37 UCKIDFK UCSGEN Environment  
 Crt: P 13 13 Display Financial Orders 10/14/03  
 Case: 2002 0000001430 DA Bond: Auth: Open Pub  
 Atty: CHESTER CALHOUN  
 File: 10/15/2002 Dispose: Worker: Reopen: Close: Inv Fee: 425.00

Type options, press Enter  
 4=Delete 5=Display A=Adjust C=Co Cases F=Fin Adjust V=Victims Z=Receipts

Cash	Parties	J/Code	Respond	Payor	S	Begin Date	Order Amount	Periodic Amount	F	Q	Total Balance
Z	PINV HDR	1	PR	1	N	11/05/2002	425.00				425.00

F3=Exit F6=Create F10=Name F13=Cmnds F16=Calc F21=Print

You will then be returned to the *Case Receipting* screen.

Continue processing your receipt by entering your password, the total paid and amount

MITTSJ37 UCWMETK UCSGEN Environment  
 Cashier: Case Receipting 10/14/03

Crt: P 13 13  
 Case: 2002 0000001430 DA CHESTER CALHOUN  
 Pty: PR 1 CALHOUN, COREY, ( 206491 )

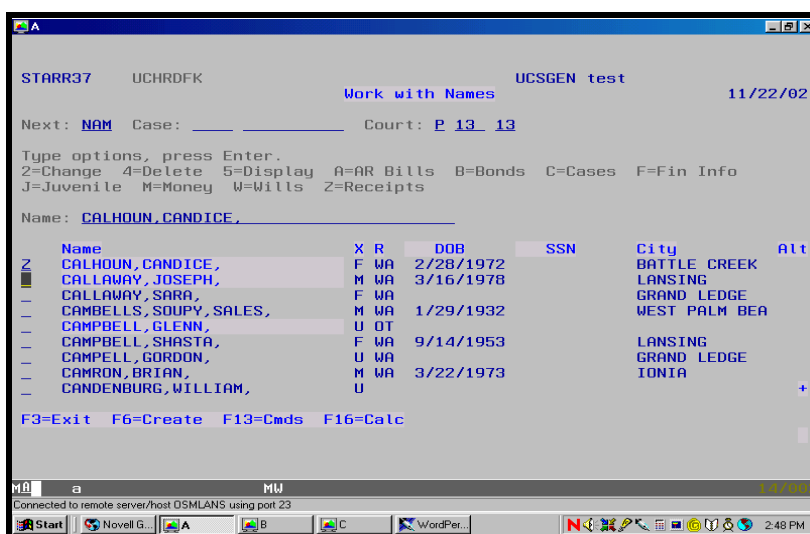
Total Paid: \_\_\_\_\_ Receipt Date: 10/14/2003  
 Bond Applied: .00 Total Balance: 425.00

Cash	Code	Balance Due	Amount Paid
PINV	PROBATE INVE	CHESTER CALHOUN	425.00

F3=Exit F6=Create F10=Names F13=Cmnds F16=Calc

## Financial Order Receipt

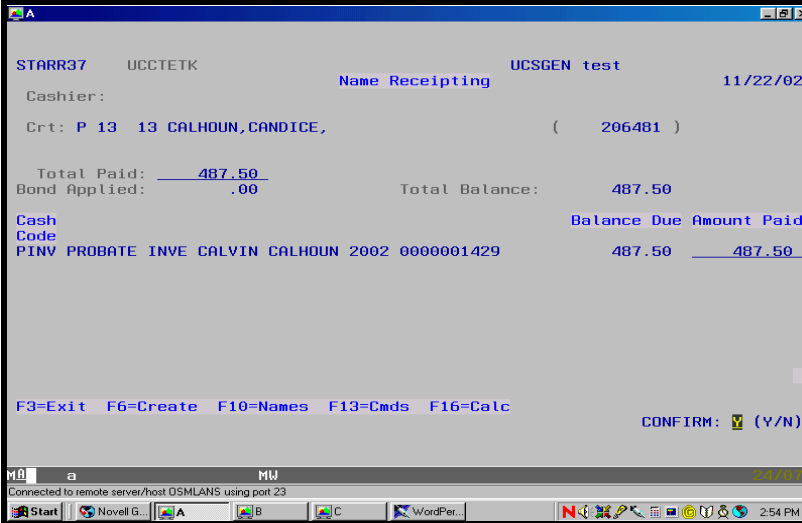
- Locate financial order(s) by name
- Enter “Z” next to the name
- All financial orders for that name within a court will be displayed at the Name Receiving screen



Press <Enter>

## Financial Order Receipts continued

- All financial orders for a name within a court will be displayed at the Name Receipting screen



STARR37 UCCTETK UCSGEN test 11/22/02  
Name Receipting  
Cashier:  
Crt: P 13 13 CALHOUN, CANDICE, ( 206481 )  
Total Paid: 487.50  
Bond Applied: .00 Total Balance: 487.50  
Cash Code Balance Due Amount Paid  
PINV PROBATE INVE CALVIN CALHOUN 2002 0000001429 487.50 487.50  
F3=Exit F6=Create F10=Names F13=Cmnds F16=Calc  
CONFIRM: Y (Y/N)

Cashier Enter cashier ID

Total Paid Enter amount paid

Press <Enter> The total paid will automatically populate the amount paid field

Press <Enter> Confirm Press <Enter>

## Financial Order Receipts continued

STARR37 UCCNETK UCSGEN test 11/22/02

EDT Edit Payment InfoNew

Court: P 13 13  
 Cashier:  
 Paid By: CALHOUN, CANDICE, Receipt Date: 11/22/2002  
 Cmt:  
 Total Due: 487.50 Total Received: 487.50  
 Bond Applied: .00 Change Due: .00

Pymt Type	Description	Reference Code	Amount Received
CK	CHECK	979	487.50

F3=Exit F10=Name F13=Cmnds F16=Calc

CONFIRM: Y (Y/N)

Connected to remote server/host OSMLANS using port 23

Start Novell G... A B C WordPer... 3:27 PM

Complete the following

- Cashier ID User's financial password
- Paid By Individual providing payment of the transaction
- Date Defaults to current date
- Cmt Additional comments regarding the transaction
- Pymt. Type Cash, checks, money order, credit card
- Reference Code Check or credit card number
- Amount Received Amount paid for the transaction

Press <Enter>

Screen will calculate Change Due and ask for confirmation

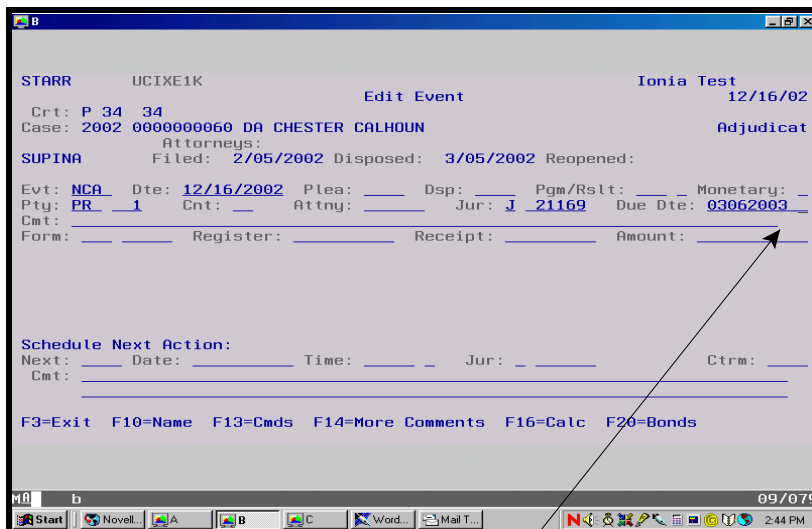
Press <Enter> - Receipt will print

## Annual Filing Events

- Requires a party and a Due Date

CA, CY	DA, DE	DD, GA, GM, GL, LG
ACC Annual Account	ACC Annual Account  NCA Notice of Continued Administration (DE & DA case types)	<b>Guardian Over The Estate</b> ACC Annual Account  <b>Guardian Over The Person</b> AGM Annual Rpt of Guardian on Condition of Minor AGW Annual Rpt of Guardian on Condition of Legally Incapacitated Individual ARPT Annual Report - Guardianships RGD Report of Guardian on Condition of Developmentally Disabled Person  GREV Guardian Review OFRG Order Following Review of Guardianship RRG Report on Review of Guardianship of Legally Incapacitated Individual RRM Report for Court Review of Minor Guardianship

 Due date is the Qualification/Anniversary date of the Fiduciary and the year the document is due.



STARR UCIXE1K Edit Event Ionia Test 12/16/02  
 Crt: P 34 34  
 Case: 2002 0000000060 DA CHESTER CALHOUN Adjudicat  
 Attorneys:  
 SUPINA Filed: 2/05/2002 Disposed: 3/05/2002 Reopened:  
 Evt: NCA Dte: 12/16/2002 Plea: Dsp: Pgm/Rslt: Monetary: \_  
 Pty: PR 1 Cnt: Attny: Jur: J 21169 Due Dte: 03062003  
 Cmt: Form: Register: Receipt: Amount:  
 Schedule Next Action:  
 Next: Date: Time: Jur: Ctrm:  
 Cmt:  
 F3=Exit F10=Name F13=Cmts F14=More Comments F16=Calc F20=Bonds

<F4> Prompt on Due Date field to select the party's Anniversary date.

**The court must modify the anniversary year, to the year the document is/was due**

Prompt on the Due Date will view the Party Date File

Note the Anniversary Date displayed for the Personal Representative

STARR UCIXE1K Ionia Test

STARR UCW2DFK

Select Parties for Event

Case: 2002 0000000060 DA CHESTER CALHOUN Adjudica

Attorneys:

Jur: SUPINA Filed: 2/05/2002 Disposed: 3/05/2002 Reopened:

Type options, press Enter.

1=Select 5=Display C=Cases D=Dates

Party: PR 1

Pty	Name	Disp Attorney	Anniv Dt
PR	1 CALHOUN, CHESTER, C, JR		3/06/2002

F3=Exit F6=Create F17=Top F18=Bottom

STARR UCIXE1K Ionia Test

Edit Event 11/05/02

Crt: P 34 34

Case: 2002 0000000060 DA CHESTER CALHOUN Adjudicat

Attorneys:

SUPINA Filed: 2/05/2002 Disposed: 3/05/2002 Reopened:

Evt: NCA Dte: 02252003 Plea: Dsp: Pgm/Rslt: Monetary: -

Pty: PR 1 Cnt: Attny: Jur: Due Dte: 03062003

Cmt:

Form: Register: Receipt: Amount:

Schedule Next Action:

Next: Date: Time: Jur: Ctrm:

Cmt:

F3=Exit F10=Name F13=Cmde F14=More Comments F16=Calc F20=Bonds

“1” to select  
Fiduciary  
Qualification -  
Anniversary date is  
03/06/2002

The document's due date should be the same month and day as the Fiduciary's anniversary date, but the year is when the document is or was due = 03/06/2003

## Closing Event



Most Cases are counted on caseload when they are closed  
Caseload Part 2 - Method of Disposition - Section A & D

Administratively Closed Caseload	Close Case/Out of System Caseload
Part 2 Sec. A - Estates/Trusts      Line 7 Part 2 Sec. D - Guardian/Conservator      Line 7	Part 2 Sec. A - Estates/Trusts      Line 8 Part 2 Sec. D - Guardian/Conserv      Line 8
ADC      Administrative Closing	CLOC      Close Case
MADC      Mem. of Administrative Closing	CIC      Certificate of Completion
	CHVO      Change of Venue Outgoing
	RGW      Receipt of Ward & Discharge
	TER      Guardianship Terminated by Court

The screenshot shows a software window titled 'A' with a menu bar (File, Edit, View, Window, Help) and a toolbar. The main area displays case information for 'STARR UCIXE1K' and 'Ionia Test 11/07/02'. The case number is '2002 0000000060 DA CHESTER CALHOUN'. The status is 'Adjudicated'. The filing date is '2/05/2002', disposed date is '3/05/2002', and reopened date is blank. The event code 'CLOC' is entered, with a date of '11/07/2002'. Other fields for 'Plea', 'Dsp', 'Pgm/Rslt', 'Monetary', 'Pty', 'Cnt', 'Attny', 'Jur', 'Due Dte', 'Form', 'Register', 'Receipt', and 'Amount' are present but mostly blank. A 'Schedule Next Action' section is at the bottom with fields for 'Next', 'Date', 'Time', 'Jur', and 'Ctm'. At the very bottom, function key shortcuts are listed: 'F3=Exit F10=Name F13=Cmnds F14=More Comments F16=Calc F20=Bonds'. The Windows taskbar at the bottom shows the Start button, several open applications (Novell G..., A, B, C, WordPer...), and the system clock at 4:02 PM.

Evt

Enter the appropriate Closing event code

Press <Enter>

After a closing event the case status will change from Adjudicated to Closed

## Reopen Event



Counted on Caseload Part 1, New Filings

DA, DE, PE, MI and CZ are counted on Section A & C, Line 3, Reopened Cases

Guardianships and Conservatorships are counted as a new filings on Section D, Line 2, New Filings

STARR37 UCIXE1K UCSGEN test

11/22/02

Case: 2002 0000001429 DE CALVIN CALHOUN Closed

Attorneys:

HARTER Filed: 6/22/2002 Disposed: 6/30/2002 Reopened:

Evt: REO Dte: 11/01/2002 Plea: Dsp: Pgm/Rslt: Monetary:

Pty: Cnt: Attny: Jur: Due Dte:

Cmt: Application/Petition to Reopen

Form: Register: Receipt: Amount:

Schedule Next Action:

Next: Date: Time: Jur: Ctrm:

Cmt:

F3=Exit F10=Name F13=Cmnds F14=More Comments F16=Calc F20=Bonds

Connected to remote server/host OSMLANS using port 23

Start Novell G... A B C WordPer... 4:17 PM

Evt REO "Reopen"

Dte Date of action/document

Cmt Reason or name of document causing reopen (Optional)

Pty Party filing (Optional)

Press <Enter>

**Remember** to verify party information



After a reopen event the case status will change from Closed to Adjudicated



## Remove Disposition Event

☞ If the disposition is to be counted again on Caseload Part 2, Method of Disposition, the prior case disposition must be removed.

- Event must include disposable party - HDR 1

— Evt    RMVD Remove Disposition

— Dte    Date of action

— Pty    Disposable party (HDR 1 - Probate)

Press <Enter>

☞ After a remove disposition event the case status will change from Adjudicated to Open and the disposition date will be blank.

## Open and Shut Case

Some cases types may be considered an open and shut case (PE cases, for example)

- Processing will begin with case initiation and flow to one event entered with a disposition. (The event will be attached to a closing event category)
- The case may be disposed and closed at the same time.

Evt PER Petition and Order for Assignment

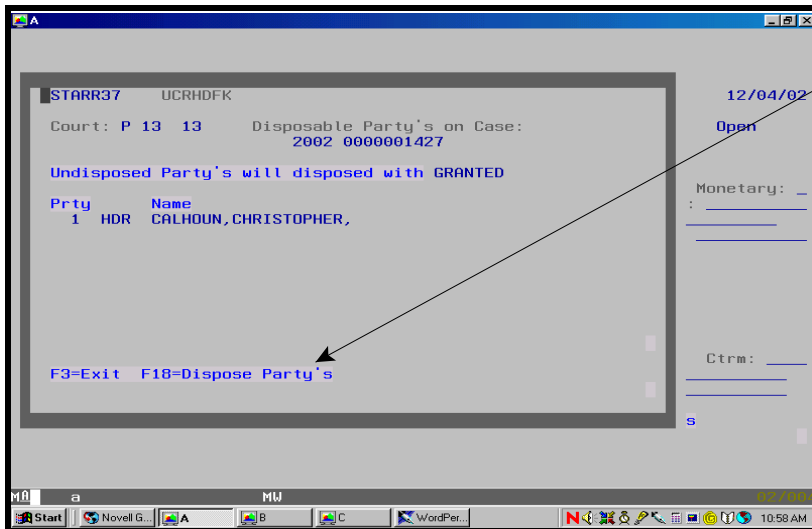
Dte Date of document

Dsp GTD "Granted" or DEN "Denied"

Press <Enter>

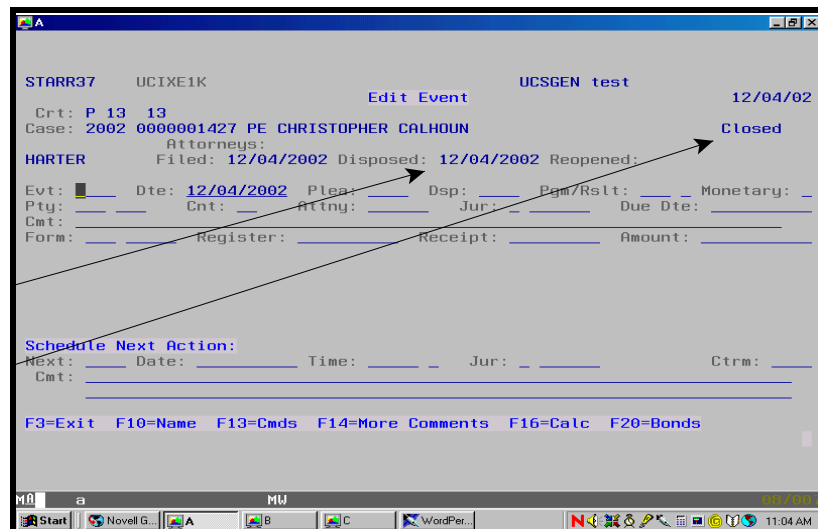
## Open/Shut Case - continued

A small screen will pop up displaying the disposable parties on the case and the case disposition



Select <F18> (Shift + F6) to dispose all parties

The case disposition date is displayed and the case status is changed to closed



## Case Type Change



Counted on Caseload Method of Disposition, Part 2, Section A & D, Line 6.

- Case has not been previously disposed
- Case Type change is by order of the court  
(e.g. Order of Formal Proceedings entered - estate ordered to be supervised,  
box 11 checked, change case type from DE to DA)

### Step 1

MITTSJ37 UCDFDFK UCSGEN Environment TEST  
Work with Cases 5/31/05

Next: \_\_\_\_ Case: 2002 0000001430 Court: P 13 13

Type options, press Enter.  
2=Change 4=Delete 5=Display 6=Notes A=Abstract B=Bond C=Charge D=Docsum  
E=Events F=Forms G=Age M=Money L=Related Cases N=Next Actions O=Eval Ord  
P=Parties R=ROA S=Sentence T=Title W=Warrants X=Case Transfer

Case	Filed Date	Adjud Date	Jurist
X 2002 0000001430 DE 10/15/2002 0 CHESTER CALHOUN			24309 HARTER
- 2002 0000001498 DD 2/01/2002 A ISAAC BANNISTER	2/01/2002	2/01/2002	11953 CLATTERBAUGH
- 2002 0000001529 CY 2/01/2002 A VERIFICATION CALHOUN	2/01/2002	2/01/2002	24309 HARTER
- 2002 0000002037 CY 2/10/2002 A GAIL DANTO	2/10/2002	2/15/2002	21169 SUPINA
- 2002 0000002112 CY 1/13/2002 A ELBERT EGGHEAD	1/13/2002	2/14/2002	21169 SUPINA

F3=Exit F6=Create F10=Name F13=Cmnds F16=Calc F19=OCN Sel

From the **Work with Cases** screen, enter an "X" - transfer case - next to the case and press <ENTER>

### Step 2

Change case type to current type.

<F4> prompt on reason and select Transfer case Type Ordered.

Enter reason for the change (suggested)

Press <ENTER>

MITTSJ37 UCDFDFK UCSGEN Environment TEST  
Case Number/Type Transfer 5/31/05

Crt: P 13 13 CHESTER CALHOUN OPEN  
Attorneys: HARTER Filed: 10/15/2002 Disposed: Reopened:

Current Case: 2002 0000001430 DE  
New Case Nbr/Type: 2002 0000001430 DA

Reason for Change/Category: F3=Exit

- ☐ Case Entered in Error
- ☐ Transfer Case Number
- ☐ Transfer Case Type
- ☐ Transfer Case Year
- ☒ Transfer Case Type Ordered

F3=Exit F6=Create F10=Name F13=Cmnds F16=Calc F19=OCN Sel

## Case Type Change continued

STARR37 UCJ1E1K UCSGEN test  
Edit Civil/Probate Case 12/02/02

Case: 2002 0000001430 DE 0 Open  
CHESTER CALHOUN  
Filed Date: 10/15/2002 Ancillary: \_  
Disposed: Reopened: Closed:

Service Type: V Value of Invent Probate Type: I Intestate  
Public: P Caseload Omit: \_ Prison Case: \_  
Jurist: J 24309 HARTER, PHILLIP E.,  
Prosecutor: \_  
Microfilm No: \_  
X-Reference: \_  
Lower Court: \_ Jury Demand Filed: \_

F3=Exit F10=Name F13=Cmde F16=Calc F11=Transfer Nbr/Typ

It may be necessary to update the Service Type for the new case type. To access the Edit Probate Case screen, enter a “2” to change at the **Work with Cases** screen.

An event is automatically created indicating “Transfer Case Type Ordered and a result of Case Type Change will also be created

Process is counted on Line 6 of the Caseload Report

New case type should be disposed through normal processing

## Wills for Safekeeping

- Hop to Edit Event with “AEV” with the case number or an “E” next to case number
- Processing for will events will require a party, and will flow to the cash receipt and will receipt
- Caseload will count each Testator party’s filed date that falls within a quarter
- Will events

WSK Will for Safekeeping  
 CLW Codicil to Last Will and Testament  
 WWD Will Withdrawn

STARR37 UCIXE1K UCSGEN test 12/02/02

Edit Event

Crt: P 13 13

Case: 2002 WILLS TR WILLS FOR SAFEKEEPING Adjudicat

Attorneys:

SUPINA Filed: 1/01/2002 Disposed: 1/01/2002 Reopened:

Evt: WSK Dte: 11052002 Plea: Dsp: Pgm/Rslt: Monetary: \_

Pty: TES Cnt: Attny: Jur: Due Dte: \_

Cmt: \_

Form: Register: Receipt: Amount: \_

Schedule Next Action:

Next: Date: Time: Jur: Ctrm: \_

Cmt: \_

F3=Exit F10=Name F13=Cnds F14=More Comments F16=Calc F20=Bonds

Evt WSK Will for Safekeeping  
 Pty Party type of TES, prompt to create and select party’s name number

**Wills for Safekeeping continued**

STARR37 UCIXE1K UCSGEN test

STARR37 UCM2DFK

Case: 2002 WILLS TR WILLS FOR SAFEKEEPING Adjudica

Attorneys:

Jur: SUPINA Filed: 1/01/2002 Disposed: 1/01/2002 Reopened:

Type options, press Enter.  
1=Select 2=Change 5=Display C=Cases D=Dates

Party: TES

Pty	Name	Disp	Attorney	Anniv Dt
1	ADAM, ANSEL, K			
2	TALBOT, DAVID,			
3	BACH, KATHERINE, ELIZABETH,			
4	DANNON, DANNY, Y			
5	GACH, LAURA,			

F3=Exit F6=Create F17=Top F18=Bottom

<F6> to create the party on the case

<F6> to create the name in the name index, then "1" to select

Press <Enter>

STARR37 UCIXE1K UCSGEN test

STARR37 UCM2DFK

Select Party Name

Type options, press Enter.  
1=Select 2=Change 5=Display

Name: CALHOUN, CHARLES, RILEY,

Name	Gender	DOB	SSN
1 CALHOUN, CHARLES, RILEY,	M	2/22/1957	529-09-0900
CALHOUN, CHESTER,	M		
CALHOUN, COREY,	M	9/15/1957	
CALLAWAY, JOSEPH,	M	3/16/1978	
CALLAWAY, SARA,	F		
CAMBELLS, SOUPY, SALES,	M	1/29/1932	
CAMPBELL, GLENN,	U		
CAMPBELL, SHASTA,	F	9/14/1953	

F3=Exit F6=Create

Record added.

## Wills for Safekeeping continued

STARR37 UCIXE1K Edit Party UCSGEN test 12/02/02

Crt: P 13 13  
Case: 2002 WILLS TR WILLS FOR SAFEKEEPING Adjudicat  
Attorneys:  
Filed: 1/01/2002 Disposed: 1/01/2002 Reopened: Closed:  
Name Nbr: 206493 CALHOUN, CHARLES, RILEY, Filed Date: 1/01/2002  
Party: TES 51 Party Cat? N  
Public: P  
Current Address: 392 MORNINGSIDE DRIVE Address Code: 206731  
City: BATTLE CREEK St: MI Zip: 49022  
Phone: Ext: Gender: M DOB: 2/22/1957 Age:  
SSN: 529-09-0900 DLN: C282982928292 St: MI  
Attny: \_\_\_\_\_ Appt/Ret: \_ Notices: \_  
Cmt: \_\_\_\_\_ Alt Names: \_  
Alternate: \_\_\_\_\_ Name: \_\_\_\_\_  
F3=Exit F10=Name F13=Cmts F23=Cancel Init

Prompt <F4> at party number field will automatically assign the next available Testator party number

Press <Enter> adds the party type/number to the case

“1” to select will add the party type/number to the event

Press <Enter>

You will be returned to the Edit Event Screen

Press <Enter>

STARR37 UCW2DFK Select Parties for Event

Case: 2002 WILLS TR WILLS FOR SAFEKEEPING Adjudica  
Attorneys:  
Jur: SUPINA Filed: 1/01/2002 Disposed: 1/01/2002 Reopened:  
Type options, press Enter.  
1=Select 2=Change 5=Display C=Cases D=Dates  
Party: TES 52  
Pty Name Disp Attorney Anniv Dt  
1 TES 52 CALHOUN, CHARLES, RILEY,  
F3=Exit F6=Create F17=Top F18=Bottom  
Record added.



**Will for Safekeeping continued**

STARR37 UCQIEFK UCSGEN test 12/02/02

Cash Receipts

Cashier: UCQIEFK  
Court: P 13 13 Case: 2002 WILLS Exists: Y

Transaction Total: .00

Qty	Cash Code	Description	Price	Amt Due
1	MSK		.00	25.00
			.00	
			.00	
			.00	
			.00	
			.00	
			.00	
			.00	
			.00	
			.00	
			.00	
			.00	
			.00	
			.00	
			.00	

F3=Exit F10=Name F13=Cmnds F16=Calc

You will be returned to the Cash Receipts screen.

Complete Cashier ID, Quantity, Cash Code, and Amount Due

Press <Enter>

You will returned to the Edit Payment Information

Complete Cashier ID, Paid By, Comments, Payment Type, Ref. Code, and Amount Received

Press <Enter>

“Y” to Confirm

Press <Enter>

STARR37 UCCNETK UCSGEN test 12/02/02

EDT Edit Payment InfoNew

Court: P 13 13  
Cashier: UCQIEFK  
Paid By: CHARLES CALHOUN  
Cmt: Deposit Will  
Total Due: 25.00  
Bond Applied: .00

Receipt Date: 12/02/2002  
Total Received: 25.00  
Change Due: .00

Pymt Type	Description	Reference Code	Amount Received
CK	CHECK	390	25.00

F3=Exit F10=Name F13=Cmnds F16=Calc

CONFIRM: Y (Y/N)

## Wills for Safekeeping continued

STARR37 UCJ8E1K UCSGEN test 12/02/02

File Edit Transfer Appearance Communication Assist Window Help

PrintScreen Copy Paste Send Recv Display Color Map Record Stop Play Quit Clipboard Support Index

Court: P 13 13  
Case: 2002 WILLS

Will Nbr: 132 Type/Event: Will 122

Testator Name: CALHOUN, CHARLES, RILEY, 206495  
SSN: 389029829  
Address: 392 MORNINGSIDE DRIVE  
City: BATTLE CREEK ST: MI Zip Code: 48839

Depositor Name: CHARLES RILEY CALHOUN Address Code: 206744  
Address: 392 MORNINGSIDE DRIVE  
City: BATTLE CREEK ST: MI Zip: 48839

F3=Exit F6=Create F13=Cmnds F16=Calc

MA b MW 15/018

Connected to remote server/host OSMLANS using port 23

Start Novell G... A B C WordPer... 2:25 PM

You will returned to the Edit Will Activity Screen

Enter social security number, if not previously entered on the name.

Prompt to select depositor's name from name index or enter name manually

Press <Enter>

Will receipt prints

Will activity may be viewed by entering a "W" next to the name

Press <Enter>

STARR37 UCJ7DFK UCSGEN test 12/02/02

File Edit Transfer Appearance Communication Assist Window Help

PrintScreen Copy Paste Send Recv Display Color Map Record Stop Play Quit Clipboard Support Index

Court: P 13 13  
Work with Wills for: CALHOUN, CHARLES, RILEY, 206495

Type options, press Enter.  
2=Change 5=Display P=Print Receipt

Will #	Will Type	File Date	Evt#	Depositor Name
132	Will	12/02/2002	122	CHARLES RILEY CALHOUN
132	Codicil	12/02/2002	123	CHARLES RILEY CALHOUN
132	Will Withd	12/02/2002	124	CHARLES RILEY CALHOUN

F3=Exit F10=Name F13=Cmnds F16=Calc

MA a 15/018

Connected to remote server/host OSMLANS using port 23

Start Novell G... A B C WordPer... 2:25 PM

## Will Withdrawn

- Locate individual by name, then C for Cases
- Individual's party type/number will be displayed in the w/w cases screen
- "E" next to the case to access events and <F6> to create
- WWD "Will Withdrawn" event
- On the event, it is important to add or select the individual's correct party type/number
- Once the event is entered, the will activity will be simultaneously recorded for the name selected
- If the individual did not return with their will receipt for completion, one may be printed through Will Activity - "W" next to the name/name index, "P" to Print next to Will

The screenshot displays a software window titled 'A' with a menu bar (File, Edit, View, Window, Help) and a status bar at the bottom showing 'MW' and '9:01 AM'. The main area contains the following information:

STARR37 UCIXE1K UCSGEN test 12/16/02  
 Edit Event  
 Crt: P 13 13  
 Case: 2002 WILLS TR WILLS FOR SAFEKEEPING Adjudicat  
 Attorneys:  
 SUPINA Filed: 1/01/2002 Disposed: 1/01/2002 Reopened:  
 Evt: WWD Dte: 12/16/2002 Plea: Dsp: Pgm/Rslt: Monetary: \_  
 Pty: TES 17 Cnt: Attny: Jur: J 21169 Due Dte: \_  
 Cmt: \_  
 Form: Register: Receipt: Amount: \_  
 Schedule Next Action:  
 Next: Date: Time: Jur: Ctrm: \_  
 Cmt: \_  
 F3=Exit F10=Name F13=Cmnds F14=More Comments F16=Calc F20=Bonds

## Trust Registration and Wills for Decedents Estates

- Trust Registrations and Wills for Decedents Estates fall under the TR case type
- TR case types may be filed in an individual file or as a group file
- **Party types** with filed dates that fall within the quarter are counted on Caseload

TR - Trust Registration, must use the party type of "TRU" Trustor  
Part 1, Section A, New Filings, Line 2

Wills, must use the party type of "TES" Testator  
Part 1, Section B, New Filings, Wills

STARR37 UC1KE1K Edit Party UCSGEN test 12/16/02

Crt: P 13 13  
Case: 2002 TRUST REGS TR TRUST REGISTRATION Adjudicat  
SUPINA Attorneys:  
Filed: 1/02/2002 Disposed: 1/02/2002 Reopened: Closed:

Name Nbr: 213 SACK, SUSAN, Filed Date: 12/16/2002  
Party: TRU 8 Party Cat? N  
Public: P  
Current Address: 2300 S. CLARETON ROAD Address Code: 38925  
City: LANSING St: MI Zip: 48900  
Phone: 517/347-8989 Ext: Gender: F DOB: 7/31/1984 Age:  
SSN: 360-60-1245 DLN: St: MI  
Attny: Cmt: Appt/Ret: Notices:   
Alternate: Name: Alt Names:   
F3=Exit F10=Name F13=Cmnds F23=Cancel Init

MA b 10/016  
Start Novell G... A B C WordPer... 9:37 AM

Locate current Trust Registration or Wills for Decedents Estate group file

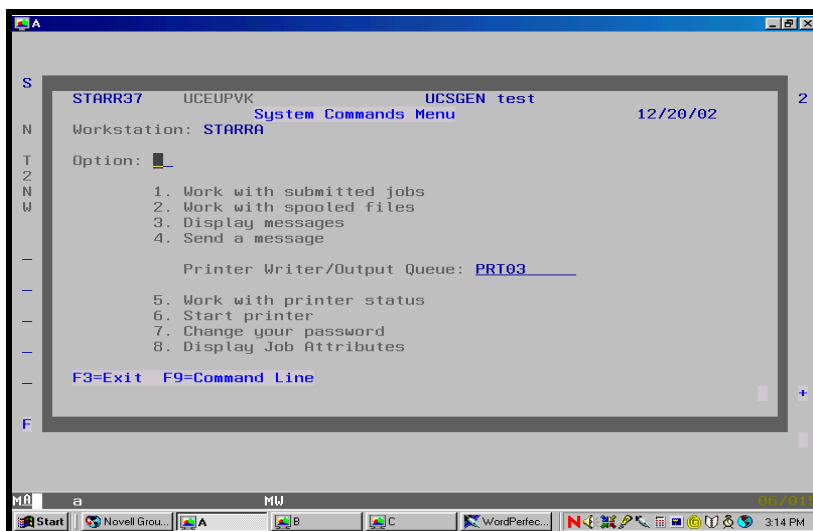
- "P" next to the case, to access work/w Parties\*
- <F6> create Party
- Locate party's name in index or <F6> to create, then 1 to select name
- Enter appropriate Party Type (see above), <F4> on number field to automatically provide next available party number
- Press <Enter>

**\*Optional - Courts may choose to create an event of TRU or WDE with the party type and number**

## System Commands

The System Commands Menu is used to work with print jobs and printer outq details.

Press < F13> (Shift + F1)



Option: \_\_\_\_

1. Work with submitted jobs: Displays the job name and status information of a print job
2. Work with spooled files: Displays all of the spooled files that are currently on the system. Listing of all print jobs with detail information such as status, number of pages, etc.
3. Display messages: Displays system messages or messages sent from other AS400 users.
4. Send a message: Allows the user to send a message to one or more users on the system. You can specify whom to send the message to, if you want to interrupt that person, the type of message you want to send, and the text of the message.

Printer Writer/ Output Queue \_\_\_\_\_ (indicates the user's assigned printer)

5. Work with the printer status: Displays all of the attributes and current job information associated with the specified printer writer/output queue.
6. Start Printer: Starts the user's printer.
7. Change Password: Allows the user to change their own password, to encourage security.

